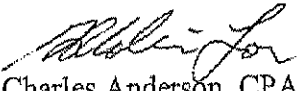




M E M O R A N D U M
BOARD OF COUNTY COMMISSIONERS
OFFICE OF THE COMMISSION AUDITOR

TO: Honorable Barbara Carey-Shuler, Ed.D.

DATE: December 13, 2004


FROM: Charles Anderson, CPA
Commission Auditor

SUBJECT: Procurement
Information

Attachments 1 and 2 are provided in response to your requests for procurement-related information in regards to the following matters.

- Comparison of procurement processes in use by Miami-Dade, Broward, and Palm Beach counties (Attachment #1).
- Information concerning the National Purchasing Institute's *Achievement of Excellence in Procurement* (AEP) award program for which Miami-Dade County is one of the recipients in 2004. A table is included that summarizes the number of FY 2003-04 contracts awarded by the Department of Procurement Management. (Attachment #2).

Historical information on the incidence of fraud and abuse by county employees in procurement matters is being compiled by the OIG and will be provided as soon as it is available.

Attachments:

- #1 Comparison of Procurement Processes of Broward, Miami-Dade and Palm Beach Counties
- #2 National Purchasing Institute's *Achievement of Excellence in Procurement* (AEP) Award Program

cc: Honorable Chairman Joe A. Martinez
and Members, Board of County Commissioners

Summary of Procurement Processes
Broward, Miami-Dade, and Palm Beach Counties

	Broward County	Miami-Dade County	Palm Beach County
BCC Awards?	\$200,000 or more; professional services \$100,000 or more	Public improvements over \$500,000; supplies, materials & services over \$1,000,000 with exceptions noted below.	\$100,000 or more.
Delegated Award Authorities?	Purchasing Director awards when BCC approval not required; authority is redelegated to using divisions for goods & services up to \$3,500.	County Manager has authority for awards without the need for action by the County Commission for: (1) public improvements (construction) up to \$500,000; (2) supplies, materials & services (including professional services, other than professional architectural, engineering and other services subject to Sec. 2-10.4 and Sec. 287.055 Fla Stats.) up to \$1,000,000; and (3) contracts of other government entities without limit. Up to \$100,000, DPM Director authorizes sole source, bid waivers, and confirmation (unauthorized) purchases. Department Directors have authority for small purchase orders up to \$10,000 and for emergency purchases up to \$100,000. Expedited procurement processes authorized by ordinance for: PTP, SNP, & QNIP projects; MDAD procurement advertisements; capital projects funded in approved multiyear capital plan; and contracts related to recovery from natural disasters or declared emergencies.	Director of Purchasing awards up to \$100,000; departments have authority for goods & services up to \$1,000.
Criteria for Award?	Lowest best & final bid by responsive, responsible business.	Lowest best & final bid by responsive, responsible business. (Note: On 12/10/04, the Budget & Finance Committee forwarded to the BCC with a favorable recommendation, a proposed ordinance, "Pilot Program for Expedited Purchasing..." that includes adoption of "best value" purchasing.)	Lowest responsible, responsive bidder.
Living Wage?	Yes, contracts for covered services over \$100,000. \$9.77 per hour with Health Benefits of minimally \$1.28 per hour or \$11.05 per hour with no Health Benefits (Oct. 2004), adjusted annually (Ord. No. 2002-45, 10-8-02).	Yes, for county employees and contracts for covered services over \$100,000. \$8.81 per hours plus Health Benefits of at least \$1.25 per hour or \$10.09 per hour without Health Benefits, adjusted annually (Ord. No. 99-44, 5-11-99).	Yes, for county employees and for non-county employees providing construction-related services. \$9.57 per hour (Feb. 2003), adjusted annually (Ord. No. 03-004, 2-25-03).
Small Business Development Programs?	Minority-and Woman-Owned Business Enterprise (M/WBE); Small Business Enterprise (SBE); Federal DBE	Community Business Enterprise Program for Architectural & Engineering Services (CBE/A&E); Community Small Business Enterprise (CSBE); Community Workforce (CWP); Disadvantaged Business Enterprise (DBE) .	Small/Minority/Women Business Assistance.

	Broward County	Miami-Dade County	Palm Beach County
Local Preference?	If non-local business is low bidder, local firm(s) within 5%, both the local firm(s) within 5% and the non-local firm may submit a lower, best & final bid within 5 working days of the original notice of intent to award.	<u>Competitive bid:</u> When a non-local business submits the lowest bid, and the bid submitted by one or more local businesses is within 10%, then that non-local business and each of the aforementioned local businesses shall have the opportunity to submit, within 5 working days of bid opening, a best and final bid equal to or lower than the amount of the previously submitted low bid. <u>Request for proposals, qualifications or other submittals and competitive negotiation and selection.</u> If, in final rankings by the selection committee, a non-local business is the highest ranked proposer, and the ranking of a local proposer is within 5% of the ranking by the non-local proposer, then the highest ranked local proposer shall have the opportunity to proceed to negotiations.	If the lowest bidder or highest ranked proposer is a regional business (defined as a "business which does not have a permanent place of business within the county and which is domiciled within Broward, Martin, or Miami-Dade County for purposes of receiving a regional business preference from Broward, Martin, or Miami-Dade County"), the bids or proposals of all local businesses may be adjusted by 5% percent, solely for the purpose of determining bid or proposal award. Reciprocal interlocal agreements for application of local preferences are authorized with Broward, Martin, or Miami-Dade County.
Cone of Silence	Yes.	Yes.	Yes.

Broward County Procurement Processes

Source: "How to do Business with Broward County—A Vendor's Guide,"
<http://www.broward.org/purchasing/pui00104.pdf>, and Sec. 1-266 of the Code.

- Delegated Authorities:
 - All awards less than \$200,000 are made by the Purchasing Director, with the exception of professional services, which is \$100,000.
 - The Purchasing Director has delegated the authority to the using divisions to make purchases of goods and services that cost up to \$3,500. Written or verbal quotations may be requested by the using division. Purchases will only be made from vendors that have been properly registered by the Purchasing Division and all purchases will be made in accordance with established procedures.
- Board of County Commissioners Approval: All awards of \$200,000 or more are awarded by the Board of County Commissioners.
- Procurement Card Program: Yes. A Procurement Card Program has been established to provide for an efficient method of purchasing and paying for goods and services not exceeding \$1,000 per purchase.
- Criteria for Award: Contract award shall be made to the responsive, responsible business submitting the lowest best and final bid.
- Living Wage: Yes. Contracts for covered services in excess of \$100,000.00 per year must adhere to the Living Wage payroll rates. Covered services are: food preparation and/or distribution; security services; routine maintenance services, such as custodial, cleaning, refuse removal, repair, refinishing, and recycling; clerical or other non-supervisory office work, whether temporary or permanent; transportation and parking services; printing and reproduction services; landscaping, lawn, and/or agricultural services. The Living Wage payroll rates are: \$9.77 per hour with Health Benefits of minimally \$1.28 per hour or \$11.05 per hour with no Health Benefits. Contracts awarded or in place before October 1, 2003 are not eligible under the Living Wage Ordinance until time of renewal or replacement.
- Small Business Development:
 - The County's Minority- and Woman -Owned Business Enterprise (M/WBE) Certification Program is an incentive program to ensure minority and woman-owned firms have an equal opportunity to participate in Broward County business opportunities. The certification process makes certain that the incentive programs are limited to businesses legitimately owned and controlled by local minorities or women. The M/WBE Certification Program was reinforced in 2004 in response to a disparity study that showed minority and woman-owned firms in Broward County were not receiving a proportionate share of County business.
 - The Small Business Enterprise (SBE) Certification Program certifies firms to participate in incentive programs (Sheltered Market/Reserved Contracts) available for

small businesses and their owners located in Broward County who want to do business with Broward County. This program is the result of a 2001 Disparity Study that identified existing barriers for local small businesses in their attempts to do business with Broward. The Small Business Enterprise Certification program is administered in addition to the existing Minority- and Woman -Owned Business Enterprise Certification Program. The SBE Certification Program was introduced in 2004 to insure that small Broward businesses will receive a proportionate share of County business.

- Local Preference: Except where federal or state law or funding source restriction mandates to the contrary, in the purchase of goods, general services, or professional services governed by the Procurement Code, preference shall be given to local businesses in the following manner.
 - Competitive Bid. When a responsive, responsible non-local business submits the lowest price bid, and the bid submitted by one or more responsive, responsible local businesses is within 5% of the price submitted by the non-local business, then that non-local business and each of the aforementioned local businesses shall have the opportunity to submit, within five (5) working days of notice of intent to award, a best and final bid equal to or lower than the amount of the low bid previously submitted by the non-local business. In the case of a tie in the best and final bid between a local business and a non-local business, contract award shall be made to the local business.
 - Request for proposals, letters of interest, qualifications or other solicitations and competitive negotiation and selection in which objective factors used to evaluate the responses from vendors are assigned point totals. If, following the completion of final rankings (technical and price combined, if applicable) by the selection committee, a non-local business is the highest ranked proposer, and the ranking of a local proposer is within 5% of the ranking obtained by the non-local proposer, then the highest ranked local proposer shall have the opportunity to proceed to negotiations with the county.
- Cone of Silence: Prohibits any communication regarding a particular Request for Proposals (RFP), Request for Letters of Interest (RLI), bid, or other competitive solicitation between: (1) any person who seeks an award therefrom, including a potential vendor or vendor's representative, and (2) any County Commissioner or the Commissioner's staff, the County Administrator, Deputy and Assistants to the County Administrator, and their respective support staff, or any person appointed by the County Commission to evaluate or recommend selection in such procurement process.

Miami-Dade County Procurement Processes

Source: Sec. 2-8.1 & 2-8.9 of the Code; DBD Webpage <http://www.miamidade.gov/dbd/>,

- Delegated Authorities:
 - County Manager is delegated the authority to advertise for bid, award, and reject bids or proposals for contracts for public improvements (construction) costing five hundred thousand dollars (\$500,000) or less and purchases of supplies, materials and services (including professional services, other than professional architectural, engineering and other services subject to Sec. 2-10.4 and Sec. 287.055 Fla Stats.) costing one million dollars (\$1,000,000) or less without the need for action by the County Commission. The County Manager may access contracts of other government entities without limit.
 - The County Manager is delegated the authority to utilize any of the following processes for selection of a contractor to perform contracts for public improvements involving the expenditure of five hundred thousand dollars (\$500,000.00) or less: competitive price bidding, request for proposals, or request for qualifications without the need for prior approval of the County Commission.
 - The County Manager shall review all construction projects to determine whether the break-up of the project into smaller contracts will increase the opportunity for CSBEs to participate therein. For those contracts where the County manager requests authority from the County Commission to advertise, the request for such authority shall advise the steps taken to accomplish the foregoing sentence. The County Manager may designate appropriate County staff to exercise the authority delegated hereunder by administrative order, approved by the Board of County Commissioners.
 - Most authorities are redelegated to the DPM Director. Up to \$100,000, DPM Director authorizes sole source, bid waivers, and confirmation (unauthorized) purchases.
 - Department Directors have authority for small purchase orders up to \$10,000 and for emergency purchases up to \$100,000.
- Purchasing Card Program: The purchasing card program provides departments with an alternative method of purchasing and paying for goods and services without utilizing the County's standard small purchase order procedure. Unless specifically authorized elsewhere, prohibited purchases include, but are not limited to, non-business items, items for personal use, cash advances and other similar purchases that can be construed to lack a public benefit. Individual purchases are limited to a \$500.00 per item. A daily maximum of \$2,000.00 and a monthly limit of \$10,000.00 per card in total purchasing card expenditures will be enforced. Exceptions to established credit limits must be justified and submitted in writing by Department Directors for approval by Finance Director.
- Criteria for Award: Contract award shall be made to the responsive, responsible business submitting the lowest best and final bid. (Note: On 12/10/04, the Budget & Finance Committee forwarded to the BCC with a favorable recommendation, a proposed

ordinance, "Pilot Program for Expedited Purchasing..." that includes adoption of "best value" purchasing.)

- Living Wage: All service contractors, including any at an Aviation Department Facility, who contract with Miami-Dade County shall pay the Living Wage required by Sec. 2-89 of the Code to all employees providing covered services. Living Wage is also required to be paid to County employees under the County pay plans. The current Living Wage for covered contracted services is \$8.81 per hour plus Health Benefits or \$10.09 per hour without Health Benefits. Covered *services* are any one (1) of the following:
 - *County service contracts.* Contracts awarded by the County that involve a total contract value of over \$100,000 per year for the following services: food preparation and/or distribution; security services; routine maintenance services such as custodial, cleaning, refuse removal, repair, refinishing, and recycling; clerical or other non-supervisory office work, whether temporary or permanent; transportation and parking services including airport and seaport services; printing and reproduction services; and, landscaping, lawn, and/or agricultural services.
 - *Service Contractors at Aviation Department Facilities.* Any service that is provided by a Service Contractor at a Miami-Dade County Aviation Department Facility is a covered service without reference to any contract value: ramp service; porter assistance services (except employees performing tip related porter assistance services); passenger services; dispatching and communications services; meteorological navigation services; ticket counter and operations space service; janitorial services; delayed baggage services; security services unless provided by federal government or pursuant to a federal government contract; and any other type of service that a GASP permittee.
- Small Business Development:
 - The Community Business Enterprise Program for Architectural & Engineering Services (CBE/A&E) is a gender and race neutral program replacing Miami-Dade County's current B/H/WBE Program for A&E contracts. It is designed to provide contracting opportunities for small- and medium-sized firms.
 - Miami-Dade County construction contractors may also participate in the race and gender neutral Community Small Business Enterprise (CSBE) Program, which offers bonding and financial assistance. A Mentor Protégé program is also available. This community-based effort seeks to pair emerging certified CSBEs (Protégés) with similar more experienced and successful firms (Mentors) in order to provide the Protégé with business advice, assistance and training.
 - In addition to the CSBE Program, Miami-Dade County has established a Community Workforce Program (CWP), which requires contractors and subcontractors, contracting with Miami-Dade County to hire a minimum of 10% of their labor force from Designated Target Areas (DTAs) in which the Capital Construction Project is located. This program was launched May 2003 and was amended in November 2003 to provide more job opportunities for residents within Miami-Dade County DTAs.
 - DBD also administers the federally-funded Disadvantaged Business Enterprise (DBE) Program.

- Local Preference:
 - Competitive bid. When a responsive, responsible non-local business submits the lowest price bid, and the bid submitted by one or more responsive, responsible local businesses is within ten percent of the price submitted by the non-local business, then that non-local business and each of the aforementioned local businesses shall have the opportunity to submit, within five working days of bid opening, a best and final bid equal to or lower than the amount of the low bid previously submitted by the non-local business.
 - Request for proposals, qualifications or other submittals and competitive negotiation and selection. If, following the completion of final rankings (technical and price combined, if applicable) by the selection committee, a non-local business is the highest ranked proposer, and the ranking of a local proposer is within five percent of the ranking obtained by the non-local proposer, then the highest ranked local proposer shall have the opportunity to proceed to negotiations with the County under the applicable sections of this Code.
 - Professional services procured pursuant to Section 287.055, Florida Statutes. The application of local preference to professional services procured pursuant to Section 287.055, Florida Statutes shall be in accordance with the process outlined in Section 2-10.4 of the Code of Miami-Dade County.
 - Waivers. The application of Local Preference to a particular purchase or contract for which the County Manager is the awarding authority may be waived upon written recommendation of the Director of Procurement Management or successor and approval of the County Manager. Other Local Preference waivers require Board of County Commissioners approval.
 - Exceptions: No local preference shall be accorded, to prime County or Public Health Trust construction contracts whose estimated cost is five million dollars (\$5,000,000.00) or less which have been set aside for competition solely for CSBEs (Community Small Business Enterprises) under Section 10-33.02 of the Code.
- Cone of Silence: Prohibits certain oral communications regarding a particular RFP, RFQ or bid after advertisement of the RFP, RFQ or bid solicitation. Written communications, copied to the Clerk of the Board, are permitted at all times.

Palm Beach County Procurement Processes


Source: "Vendor's Guide to Doing Business with Palm Beach County," <http://www.co.palm-beach.fl.us/pur/vendguid.htm#vendresp>; and Sec. 2-355 of the Code.

- Board of County Commissioners Approval: Award of formal contracts, one-time purchases, and term contracts in excess of \$100,000 must be presented to, and approved by, the Board of County Commissioners.
- Criteria for Award: Awards shall be made to the lowest responsible, responsive bidder and shall be effective upon issuance of a purchase order, issuance of a term contract, or execution of a contract. Those awards in excess of \$100,000 shall be effective upon approval by the Board of County Commissioners.
- Living Wage: Yes, for county employees providing any services within the scope of their county employment and non-county employers directly providing construction-related services.
- Small Business Enterprises: Palm Beach County operates the Office of Small/Minority/Women Business Assistance in order to improve business opportunities in the County for small businesses. The County has established goals which guide the percentage of procurement dollars to be spent with companies certified as SBE's. Vendors must be registered with the Purchasing Department in order to be eligible for SBE certification.
- Local Preference: If the lowest responsive, responsible bidder is a regional or non-local business, then all bids received from responsive, responsible local bidders are decreased by 5%. The original bid amount is not changed; the 5% decrease is calculated only for the purposes of determining local preference. To receive a local preference, a bidder must have a permanent place of business in existence prior to the County's issuance of the Notice of Solicitation/Invitation for Bid. A permanent place of business means that the bidder's headquarters is located in Palm Beach County; or, the bidder has a permanent office or other site in Palm Beach County where the bidder will produce a substantial portion of the goods or services to be purchased. A Palm Beach County Occupational license is required unless specifically exempted by law. In the event that Broward, Martin, or Miami-Dade County, respectively, extends any preference given to local businesses within their jurisdiction to Palm Beach County businesses, Palm Beach County may enter into an interlocal agreement with such county extending the preferences established in this part to businesses located within such counties.
- Cone of Silence: Prohibits any communication, except for written correspondence, regarding a particular request for proposal, request for qualification, bid, or any other competitive solicitation between: (1) Any person or person's representative seeking an award from such competitive solicitation; and (2) Any county commissioner or commissioner's staff, or any employee authorized to act on behalf of the commission to award a particular contract.

Department of Procurement Management
Summary of Contracts Awarded
FY 2003-04

Action	DPM Delegated Authority	BCC Approved	Total
Invitations to Bid			
\$25K - \$100K	109		109
Greater than \$100K - \$1M	161		161
Greater than \$1M		22	22
Total	270	22	292
Bid Waiver/Sole Source			
\$25K - \$100K	33		33
Greater than \$100K - \$1M		17	17
Greater than \$1M		5	5
Total	33	22	55
Confirmation Purchases			
\$25K - \$100K	7		7
Greater than \$100K - \$1M		3	3
Greater than \$1M			0
Total	7	3	10
Temporary Bid Waivers			
\$25K - \$100K	30		30
Greater than \$100K - \$1M	1		1
Greater than \$1M			0
Total	31	0	31
State/Federal Contracts			
\$25K - \$100K	8		8
Greater than \$100K - \$1M	21		21
Greater than \$1M		2	2
Total	29	2	31
RFPs			
\$25K - \$100K	2		2
Greater than \$100K - \$1M	1		1
Greater than \$1M		2	2
Total	3	2	5
All Actions			
\$25K - \$100K	189	0	189
Greater than \$100K - \$1M	184	20	204
Greater than \$1M	0	31	31
Total (Item Count--All Actions)	373	51	424
Additional Items within "Bid/Waiver Packages" submitted for BCC approval			
Awards		17	17
Bid Rejections		1	1
Contract Modifications		18	18
Purchases--Other Government Contracts		8	8
Requests to Advertise		18	18
Sole Sources		6	6
Noncompetitive Bid Waivers		14	14
Competitive Bid Waivers		4	4
Contract Measures		17	17
Emergency Purchases		16	16
Noncompetitive Contract Modifications		12	12
Confirmation		3	3
Grand Total	373	185	558


Note: Numbers include solicitations awarded 10/01/03 - 9/30/04 for requisitions posted between 01/01/02 - 9/30/04. C:\Files\Procurement\Summary of DPM contracts awarded FY 2003-04.xls



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NPI Awards and Recognition Programs

The National Purchasing Institute offers individual and agency awards to recognize member contribution and organizational excellence in public purchasing.

Achievement of Excellence in Procurement (AEP)

In 1995, the National Purchasing Institute established a program designed to recognize organizational excellence in public procurement. The Achievement of Excellence in Procurement® (AEP) is awarded annually. This prestigious award is earned by those organizations that demonstrate excellence by obtaining a high score based on standardized criteria. The criteria are designed to measure innovation, professional productivity, e-procurement, and leadership attributes of the procurement organization. Furthermore, the T1 Committee selects recipients for the Outstanding Contribution Award (link to AEP special award). This recognizes individuals, groups, or teams that have provided exemplary involvement, dedicated effort, or outstanding contribution to the promotion and development of the AEP.

Carlton N. Parker Award

The Carlton N. Parker Award for Outstanding Service is the most prestigious award presented by the National Purchasing Institute (NPI). The criteria for receiving the award, as established by the Board of Directors, is that the nominee must have made outstanding contributions to the development and progress of NPI and the public purchasing profession.

Presidential Award of Merit

The NPI Presidential Award of Merit is presented to those member(s) of NPI whom the current President deems to have gone above and beyond the call of duty in their work/dedication to NPI during their presidential year.

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Achievement in Excellence in Procurement®

Is Your Organization Achieving Excellence?

In 1995, the National Purchasing Institute established a program designed to recognize organizational excellence in public procurement. The Achievement of Excellence in Procurement® (AEP) is awarded annually. This prestigious award is earned by those organizations that demonstrate excellence by obtaining a high score based on standardized criteria. The criteria are designed to measure innovation, professionalism, productivity, e-procurement, and leadership attributes of the procurement organization.

More information about the award is available at [Frequently Asked Questions \(FAQs\)](#).

The AEP is sponsored by the California Association of Public Purchasing Officers (CAPPO), Institute for Management (ISM), Florida Association of Public Purchasing Officers (FAPPO), National Institute of Governmental Purchasing (NIGP), and National Purchasing Institute (NPI). Associate sponsors are the Purchasing Group (APG), Texas Purchasing Management Association (TPMA), The Innovation Groups and U.S. Communities.

You do not have to be a large jurisdiction or city to be successful. All sizes of organizations have been successful in the past. Various types of jurisdictions have won. Counties, cities, school districts, states, districts, and universities, both public and private, are eligible. View the list of [recipients](#).

You can establish the likelihood of success of your organization by viewing the [application](#). Review the and determine your score. Although an independent [committee](#) conducts the official evaluation, an objective self-evaluation will give you a good idea of your success.

You can get assistance in completing the application through the [instructions](#) button. You will connect to an application that will provide detailed instructions on completing the application. It is strongly recommended that you review and utilize the instructional application to assist you in applying for the AEP award.

Additional questions may be addressed to Wayne A. Casper, C.P.M., Achievement of Excellence in Procurement Chair (520-791-4347 or wcasper1@ci.tucson.az.us).

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2004

The ninth annual Achievement of Excellence in Procurement awards were presented in Los Angeles, CA at the National Purchasing Institute's (NPI) conference in October, 2004.

The Achievement of Excellence in Procurement awards for 2004 were earned by the following jurisdictions:

- Alameda County Water District
- Allegheny County, PA
- State of Arizona, AZ
- Broward County, FL
- Bucks County, PA
- Cal Poly State University
- California State University
- California State University Long Beach, CA
- Central Contra Costa Sanitary District
- Charlotte County
- Charlotte-Mecklenburg
- City of Allen, TX
- City of Alpharetta
- City of Anaheim
- City of Arlington
- City of Aurora
- City of Bryan
- City of Chula Vista, CA
- City of College Station, TX
- City of Costa Mesa, CA
- City of Denton, TX
- City of Edmonton
- City of Garland
- City of Grand Prairie
- City of Lancaster
- City of Lewisville
- City of Livermore
- City of Lompoc
- City of Los Angeles Department of Water and Power
- City of Mesquite
- City of Miramar
- City of Mountain View
- City of Naperville
- City of Orange
- City of Orlando
- City of Peoria
- City of Plano
- City of Port Saint Lucie
- City of Portland
- City of Punta Gorda
- City of Richardson
- City of Richmond
- City of Rochester Hills
- City of San Antonio
- City of San Buenaventura
- City of San Diego
- City of San Jose
- City of Scottsdale
- City of Sparks
- City of Sunnyvale

- City of Temple
- City of Troy
- City of Tucson
- City of University Park
- City of Wichita
- City of Yuba City
- Clark County School District
- Collin County
- Contra Costa Water District
- County of Dutchess
- County of Los Angeles ISD
- County of Placer
- County of Riverside
- County of Sacramento
- County of San Bernardino
- County of San Diego
- County of Santa Clara
- County of Ventura
- County of Volusia
- Dallas-Fort Worth International Airport
- Denton County
- Detroit Metropolitan
- Wayne County Airport
- District of Columbia Water and Sewer Authority
- East Bay Municipal Utility District, CA
- Escambia County, FL
- Fulton County, GA
- Fulton County Schools, GA
- Georgia Institute of Technology
- Georgia Technology Authority, GA
- Gwinnett County, GA
- Inland Empire Utilities Agency, CA
- Irvine Ranch Water District, CA
- Lansing Community College, MI
- Las Vegas Convention & Visitors Authority, NV
- Lewisville Independent School District
- Los Angeles County Metropolitan Transportation Authority
- Loudoun County, VA
- Miami-Dade County
- Montgomery County
- Muskegon County
- Norfolk Public Schools
- Orange County
- Orange County Sanitation District
- Osceola County
- Pinellas County Schools
- Polk Community College
- Portland Public Schools
- Princeton University
- Rockwood School District
- Saddleback Valley Unified School District
- St. Johns River Water Mangement District
- Salt Lake County
- San Jose State University
- Seminole County
- South Florida Water Management District
- State of Florida, FL
- State of Georgia, GA
- Tarrant County, TX
- Town of Flower Mound, TX
- University of Cincinnati, OH
- University of West Florida, FL
- Washoe County, NV
- Washoe County School District, NV
- Williamson County

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Sponsors

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AEP Application and
InstructionsAEP Criteria Success
Rate

AEP

AEP Criteria Success Rate

		2000
1	Published a "How to do Business" booklet within the past 5 years? (5 pts)	96%
2	Published an "Ethics" policy statement? (5 pts)	98%
3	Published or revised a procurement manual for internal use within the past 5 years? (5 pts)	90%
4	MAINTAINED A "CONTINUOUS IMPROVEMENT" PROGRAM COMPRISED OF THE FOLLOWING	
4a	At least two meetings of formal procurement focus group within past fiscal year (5 pts)	54%
4b	Formal procurement customer survey within past 3 years (5 pts)	71%
4c	Formal user agency training (5 pts)	85%
4d	Formal vendor training with scheduled and agendaized workshop (5 pts)	50%
5	Centralized procurement authority based in law (10 pts)	92%
6	INTERNAL PROCUREMENT AUTOMATION?	
	ELECTRONIC PURCHASE ORDERS (5 pts) (2002)	90%
	LOCAL AREA NETWORK (5 pts) (2003)	94%
6a	Maintenance of a bidders list (5 pts)	81%
6b	User access (e.g., directly enter requisitions, make on-line status inquiries, enter contract release orders, etc., by the using agency) (5 pts)	90%
7	UTILIZATION OF ELECTRONIC COMMERCE (ELECTRONIC TRANSMISSION OF DATA WITH BUSINESS COMMUNITY)?	
7a	Internet home page with link to purchasing activities (5 pts)	92%
7b	On-line electronic vendor registration (5 pts)	52%
7c	ON-LINE INTERACTIVE REQUEST FOR QUOTATION (RFQ) PROCESS (5 pts) (2002)	N/A
7d	Posting of solicitations (IFB & RFP) (5 pts)	83%
7e	System e-mail notification of formal solicitation to prospective registered bidders (5 pts)	27%
7f	Distribution of solicitations (IFB & RFP) via the Internet (5 pts)	60%
7g	DISTRIBUTION OF FORMAL SOLICITATIONS (IFB & RFP) VIA A FAX-ON-DEMAND (PC OR NETWORK BASED FAX TRANSMISSION) SYSTEM (5 pts) (2004)	28%
7h	Receipt of formal bids & proposals via the Internet (5 pts)	6%
7i	Posting of IFB opening tabulation on Internet (5 pts)	48%
7j	POSTING OF NOTICE OF AWARD AND AWARD TABULATION (5 PTS) (2001)	N/A
7k	Electronic purchase order to vendor (5 pts)	4%
7l	"REVERSE" INTERNET AUCTION SYSTEM TO PURCHASE MATERIALS AND SUPPLIES (5 PTS) (2001)	N/A
7m	INTERNET AUCTION SYSTEM TO DISPOSE OF SURPLUS MATERIALS (5 PTS) (2001)	N/A
8	PROCUREMENT CARD PROGRAM	
8a	UTILIZATION OF A COMPREHENSIVE PROCUREMENT CARD SYSTEM (5 pts) (2003)	N/A
8b	FORMAL PROCUREMENT CARD AUDIT (5 pts) (2004)	N/A

9	Comprehensive Inventory (warehouse) system maintained by the purchasing organization (5 pts)	67%
10	Use of term (annual or requirements) contracts for at least 25% of total dollar commodity and services purchases (10 pts)	69%
11	PROFESSIONAL CERTIFICATION	
11a.	Current Certified Purchasing Manager (C.P.M.), Certified Professional Contracts Manager (CPCM) or Certified Public Purchasing Officer (CPPO) designation earned by Chief Procurement Official? (10 pts)	78%
11b.	Current Certified Purchasing Manager (C.P.M.), Certified Professional Contracts Manager (CPCM), Certified Public Purchasing Officer (CPPO), Accredited Purchasing Practitioner (A.P.P.) or Certified Public Purchasing Buyer (CPPB) designation earned by at least 33% of professional staff? (10 pts)	67%
12	EDUCATION	
12a.	A degree from a four year University or College earned by the Chief Procurement Official (5 pts)	90%
12b.	A degree from a four-year university or college earned by at least 50% of the professional staff (5 pts)	58%
13	Established a professional staff-training program (5 pts)	50%
14	Professional staff member with a position in a national or regional purchasing association during this fiscal year (5 pts)	85%
15	Participation at a national or regional conference as a presenter or panel member on a public procurement topic within the past two years (5 pts)	60%
16	Adoption of legislation or ordinance based on the American Bar Association's Model Procurement Code (10 pts)	10%
17	ENVIRONMENTAL PURCHASING	
17a.	Formal environmental purchasing policy including reuse, reduce, and recycle provisions (5 pts)	42%
17b.	Publication within past 3 years of performance report on environmental purchasing (5 pts)	17%
18	LEAD AGENCY IN A COOPERATIVE PURCHASING CONTRACT (5 pts) (2004)	N/A

* Criteria Deleted

*** New Criteria Established

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